



GEARS

General Enterprise And Resource Support

FUNCTIONAL TRAINING ANNOUNCEMENT

The Departments of Budget and Finance and Procurement, Contracts and Grants Administration and District Court Headquarters in coordination with the GEARS Team will be offering additional training to assist users in understanding processes to successfully perform their jobs. We are offering sessions specific to select audiences, so please be sure to register for the correct session. The time for each session is noted in the below chart as well.

To attend training, a person should be an active “user” of the GEARS system and already have a User ID.

District Court (Procure to Pay, Reporting and Supervisory): These sessions will cover the areas of Procure to Pay, i.e. requisitions, Express PO's, receipts and voucher processing, specific to District Court processing, as well as the Voucher Activity Inquiry tool. In addition, other topics may include supervisory worklist tasks and any other reporting needs deemed necessary by DC Headquarters.

Order to Cash Refresher – These sessions will be a refresher for OTC court personnel. Topics may include bad check processing, AR revenue refunds, CCU & P&P adjustments, judgment liens, voucher activity inquiry, reporting and a review of adjustment types and their correct usage. ***Please bring your OTC manual to class.***

Order to Cash Two-day Session – These sessions are exclusively for OTC staff that are new to the Judiciary and have not been through the full Order to Cash training in the past, whether held on-site prior to go-live or at the JECC. The OTC manual will be used as the guide and will cover all topics of daily and month-end processing. Attendance will be limited to the targeted audience. ***Please bring your OTC manual to class.***

Procure to Pay – These sessions will cover the areas of requisitions, Express PO's, receipts and voucher processing, as well as the Voucher Activity Inquiry tool. A review of communication from the AOC and reoccurring voucher issues will also be reviewed. In addition, the tools and schedule for procurement monitoring will be discussed. (Please note, DC will hold its own training session.)

Reporting: General Ledger (GL) and Commitment Control (KK) Entries and Reporting – These sessions will cover the areas of journal entries and reporting options within both the general ledger and the commitment control modules. Reports and Inquiries to be reviewed include the Trial Balance, Budget Status, Budget Overview, Ledger Inquiry with drilldowns, and the Voucher Activity Inquiry. There will be time in the afternoon for participants to get individual assistance in setting up run controls for their reports or to have other questions or issues addressed. (Please note, DC will hold its own training session.)

Supervisory Overview – These sessions are exclusively for those Judiciary staff members who receive approval workflow notices and will include what should be reviewed during the approval process, as well as touch on some of the reporting options. (Please note for District Court staff, this topic is covered in their training session noted above.)

Travel Policy Review – These sessions will review the current Judiciary travel policy, as well as the proper completion of the Expense Reimbursement form. In addition, reoccurring errors will be discussed.

*****All training will be held at the Judicial College (formerly known as the JECC) in Lower Level Room #10.*****

****Training sessions are subject to cancelation pending enrollment numbers.****

Lunch is provided for full-day sessions.

Please ensure you have registered at least one week before selected class date(s). Please keep in mind that we can accommodate 20 people in each class and the registrations will be processed in the order they are received. You will receive an email confirmation in return.



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"FUNCTIONAL" TRAINING REGISTRATION FORM

NAME _____ PHONE # _____

EMAIL _____ OFFICE LOCATION _____

- ☐ Please check – I have received approval from my supervisor to attend the specified workshop(s).

Please select training dates from the below:

Procure to Pay (DC) ½ Day - ☐ April 5 ☐ April 17

Procure to Pay (others/non-DC) Full Day - ☐ April 12 ☐ April 26

Order to Cash Refresher ½ Day - ☐ March 31 ☐ April 14

Order to Cash Comprehensive Two-Day Training - ☐ April 20 and 21

Reporting: GL and KK (non-DC) Full Day - ☐ March 28 ☐ April 25

Supervisory (non-DC workflow Aprovers) ½ Day - ☐ March 29 ☐ April 27

Travel Policy Review (all) ½ Day - ☐ March 29 ☐ April 27

PLEASE COMPLETE THIS FORM IN ITS ENTIRETY AND FAX TO GEARS PROJECT at 410-260-1290.

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